


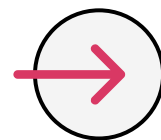
THIS IS YOUR  
FINANCIAL HEALTH

.....

assessment 

Sharing the manual

# Financial Health Assessment



## ASSESS YOUR FINANCIAL HEALTH

Complete the questions using PART 1 of the pie diagram. Be truthful, no judgement, hold space for curiosity as it is the antidote. What could be underneath, we can then dive deeper into what lens you created this narrative behind and dismantle so you too can flourish and thrive financially. Score between 0-5, zero on the low end, 5 means kicking ass.

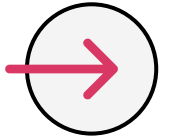
### PART 1



- empowered**  
Do you feel empowered by your financial situation?
- awareness**  
Are you self-aware of your money patterns and behaviours?
- communication**  
Can you communicate effectively with your partner about money?
- confidence**  
Are you confident about your financial future?
- entrepenueral**  
Do you have multiple streams of income?
- growth mindset**  
Are you able to learn and grow from your past money mistakes?
- continual learner**  
Always looking to grow your financial literacy.
- go getter**  
I have a plan in place to reach my financial goals.
- accountability**  
I take 100% responsibility for my current financial situation?
- emotional intelligence**  
Are you able to recognize when emotions are driving your purchases?



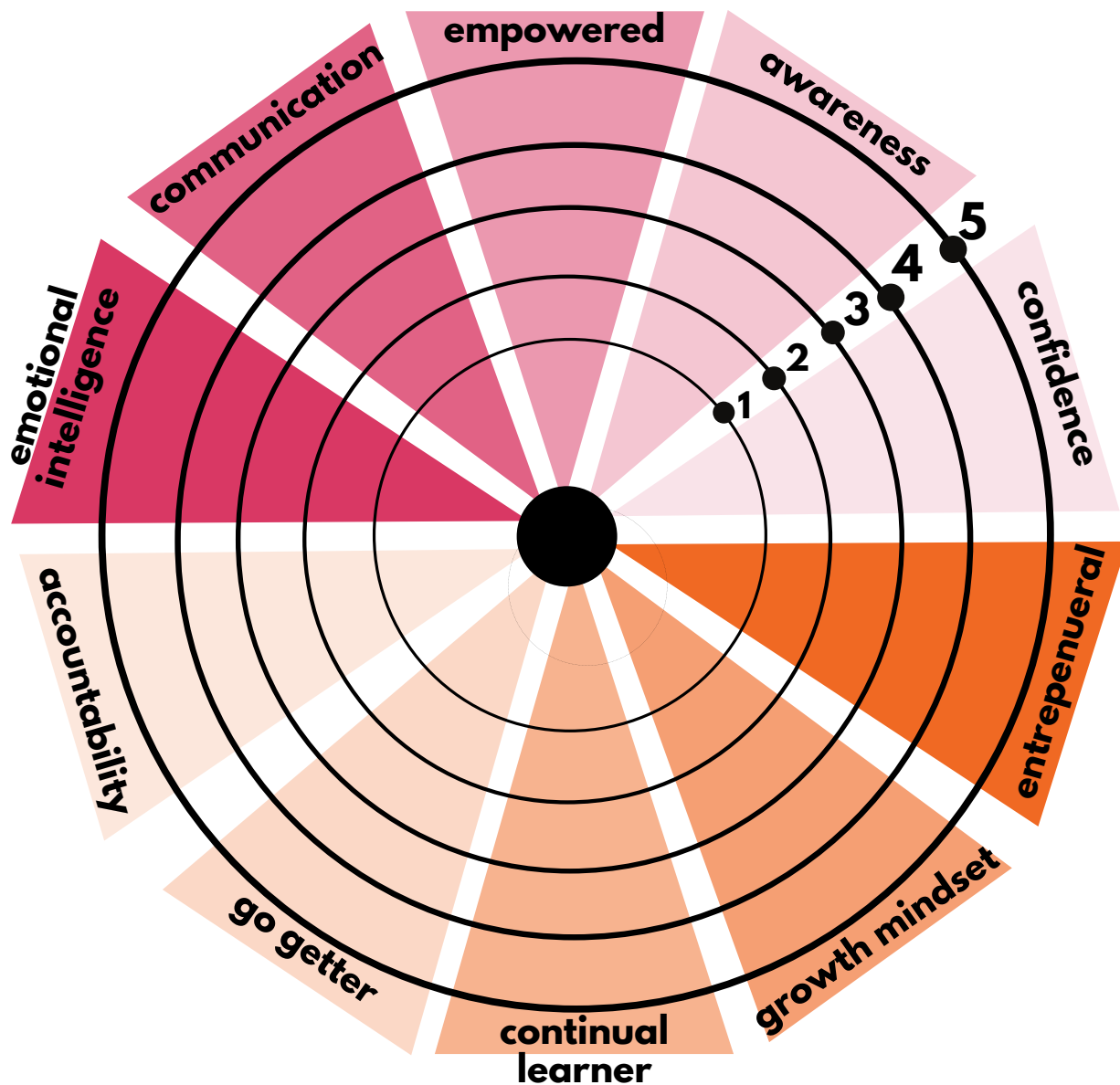
# Financial Health Assessment



## PART 1

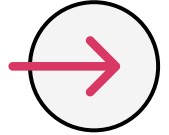


Using a scale of 0 -5, zero being low awareness and five being rockstar. Place a dot on the line that represents you and where you are today in each category. Then connect your dots to see the full picture. Book your 60-minute complimentary coaching session for tips and tricks to enhance your financial health.





# Financial Health Assessment



## ↘ ASSESS YOUR FINANCIAL HEALTH

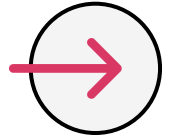
Complete the questions using PART 2 of the pie diagram. Be truthful, no judgement, hold space for curiosity as it is the antidote. What could be underneath, we can then dive deeper into what lens you created this narrative behind and dismantle so you too can flourish and thrive financially.

### PART 2

- beliefs**  
Do your current money beliefs allow you to flourish?
- mindfulness**  
Are your thoughts about finances positioning you to thrive?
- physical symptoms**  
Are you able to regulate financial stress in the body?
- emotions**  
Are you able to control your emotions prior to spending?
- spiritual**  
Do your spiritual beliefs align with your spending?
- giving back**  
Are you giving back in a way that brings abundance and life?
- career**  
Is your current career allowing you to thrive financially?
- relationships**  
Are you in a relationship that builds positivity with your money?
- community**  
Are you aware that your community can affect your finances?
- financial health**  
Does your current financial health position you to flourish?



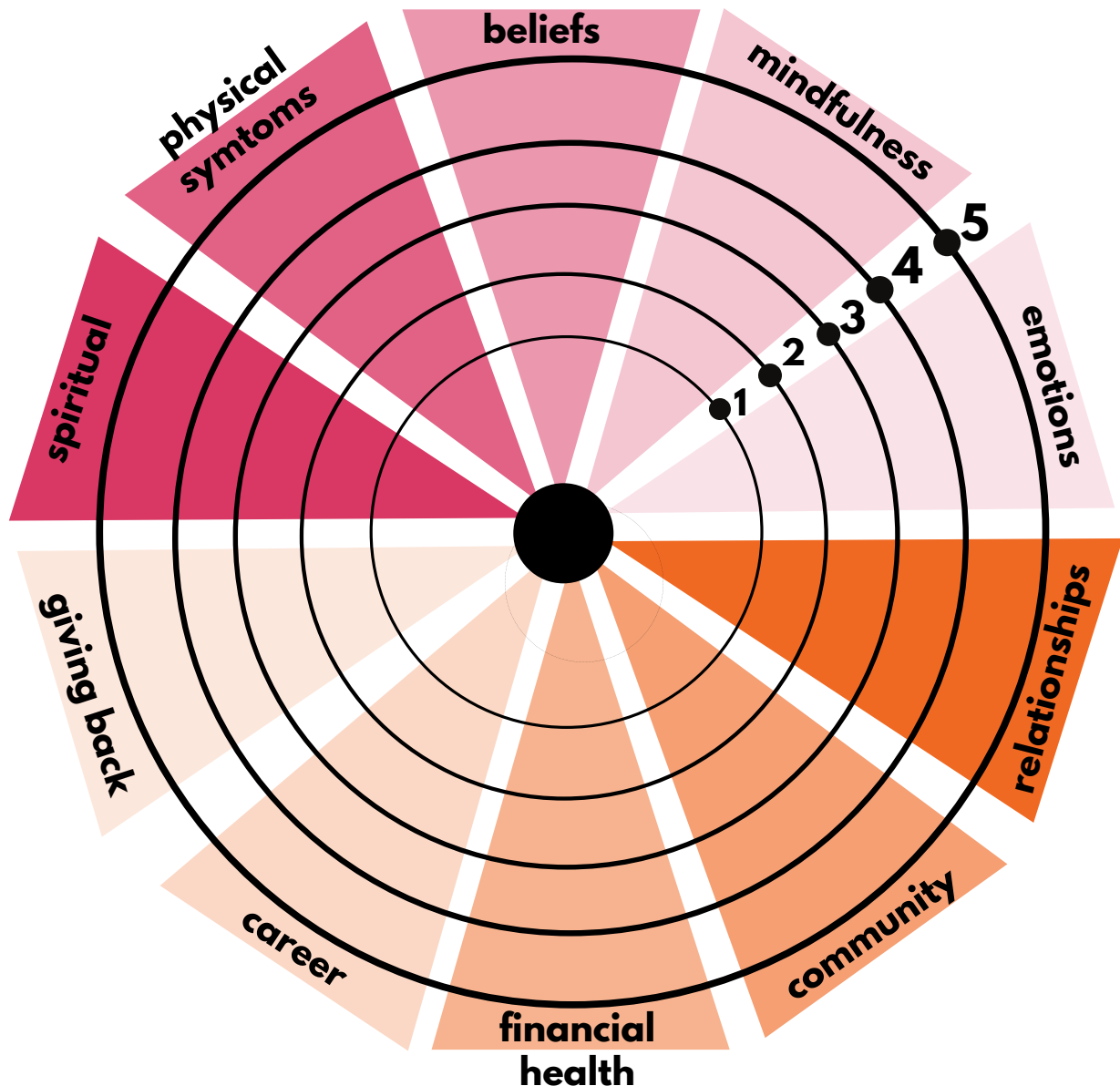
# Financial Health Assessment



PART 2

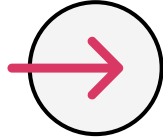


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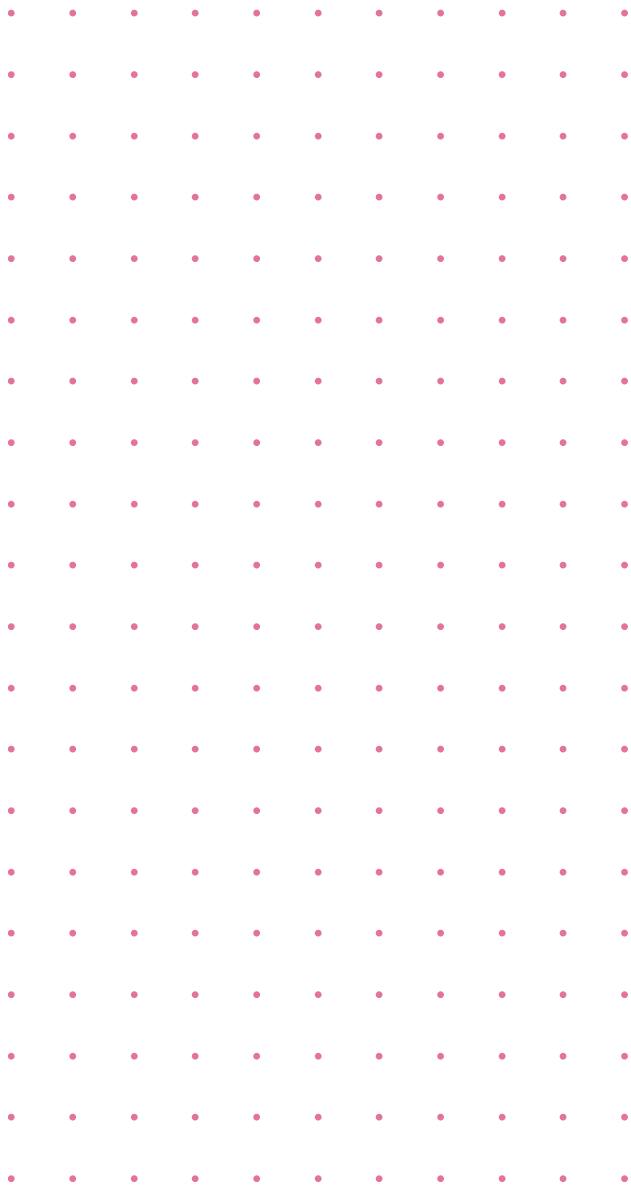




# Self Reflection



↘ JOURNAL YOUR THOUGHTS AND FEELINGS. WHERE ARE YOUR STRENGTHS AND WEAKNESSES?



What Surprised You?



Empty text area for journaling 'What Surprised You?'

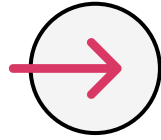


↘ Key Notes

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# Next Steps



## ↘ WHAT ARE YOUR MOST PRESSING AREAS FOR GROWTH?

*Choose two areas you'd like to work on over the next few months. Write down a SMART goal for each of them. List any actions you need to achieve your goals.*

X	
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X	
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# *Come as you are...*

We take you deeper through the process - SERVING YOU IN ANY STAGE

In addition to our Financial Wholeness Ten Week Study we offer the following services:

- workshops / webinars
- speaking events / conferences
- money coaching group sessions / 1:1
- financial healing journey
- budgeting - cash flow analysis
- net worth summary
- savings regimen
- insurance products
- investment products
- sounding board
- second opinion
- referral to a professional advisory team of lawyers or accountants
- problem-solving - solutions driven
- full gamut: determining your finish lines and creating a custom plan, implementation, continual review

We can be reached at [amie@youinsureinc.ca](mailto:amie@youinsureinc.ca) - 403-866-5600 - [www.youinsureinc.ca](http://www.youinsureinc.ca)

*connecting the dots*

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**you should connect** <sup>!</sup>